

# North Carolina COVID-19 Vaccine Management System (CVMS)

## Organization Portal User Guide

Version 3

March 5, 2021



NC DEPARTMENT OF  
**HEALTH AND  
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the  
CVMS Help Desk Portal\* at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

You can also call the COVID-19 Vaccine Provider & Organization Help Center at (877) 873-6247 and select option 1. The COVID-19 Vaccine Provider & Organization Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

CVMS Help Desk Portal

**Vaccine Provider**  
For use by vaccine providers

**Vaccine Redistribution/Transfer**  
Request redistribution or transfer of COVID-19 vaccine inventory

**Vaccine Recipient**  
For use by Vaccine Recipients

**Organization/Employer**  
For use by front-line Organizations/Employers

**Knowledge**  
Browse and search for articles

**HCP Onboarding & Recipient Bulk Upload**

**Quick links for Vaccine Providers**

1. Please **Login** using the username from the registration email, **NOT** your NCID.
2. If you are a first time user - please **Register**
3. Forgot your password? **Let's reset it!**

On the home page of the CVMS Help Desk Portal, select the “**Organization/Employer**” option to submit your question, issue, or request.

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# Process Overview

# Overview

The screenshot displays the NCDHHS CVMS Organization Portal. The header includes the NCDHHS logo and navigation links for Home, Bulk Registration, and Help & Information. The main content area is titled "Instructions for Bulk Registration: Employee Upload" and contains a numbered list of steps for uploading a CSV file. Below the instructions, there are links for "Low Volume (100)" and "High Volume (5,000)". The "Employee Upload (Low Volume)" section is active, showing a "Drag and Drop CSV file here" area. At the bottom, there is a search bar and a table header with columns for First Name, Last Name, Date of Birth, and Email.

**NCDHHS CVMS Organization Portal**

Home Bulk Registration Help & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, date of birth, and email address for each person on the list. Download the Bulk Registration Upload Excel template.
2. Enter the first name, last name, date of birth, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.
  - a. Note: All fields are required for each record. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)
3. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.
4. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:
  - a. Low Volume If your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.
  - b. High Volume If your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.
5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab
6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

Low Volume (100) High Volume (5,000)

**Employee Upload**  
(Low Volume)

If you're uploading 100 employees or less, upload file below.

Drag and Drop CSV file here

Total number of records: 0

Search this list...

First Name Last Name Date of Birth Email

**This guide is intended for frontline organizations which are *not* Healthcare Vaccine Providers.**

As a frontline organization, you will have the opportunity to upload your eligible employees or individuals into the CVMS Organization Portal so that they can register in the COVID-19 Vaccine Portal prior to receiving the COVID-19 vaccine.

This user guide will focus on four core areas:

1. Completing the Recipient Bulk Upload Template
2. Uploading the Recipient Bulk Upload File to the CVMS Organization Portal
3. Correcting File Errors & Re-uploading
4. Viewing uploaded Recipient records

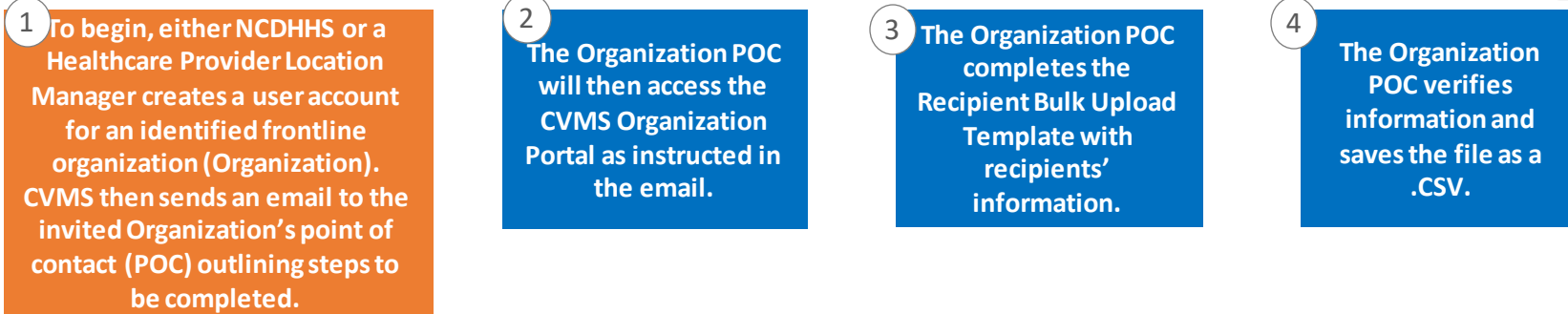
*You will also need to:*

- Use the latest version of Chrome, Edge Chromium, Firefox, or Safari browsers (Internet Explorer and Edge (non-Chromium) browsers are not supported)
- Use Microsoft Excel (or any equivalent spreadsheet editor) to edit the Recipient Bulk Upload Template file
- Log in the CVMS Organization Portal account at

<https://covid-vaccine-employer-portal.ncdhhs.gov>

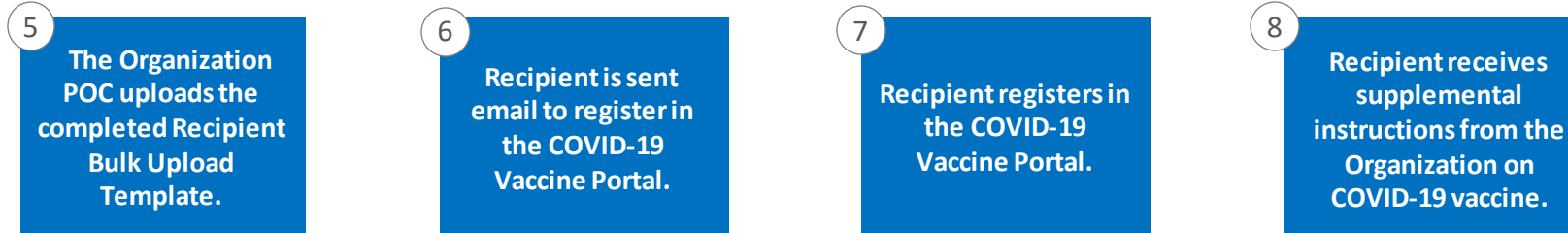
**Now, let's get started!**

# Recipient Bulk Upload Registration Process Overview



## Audience

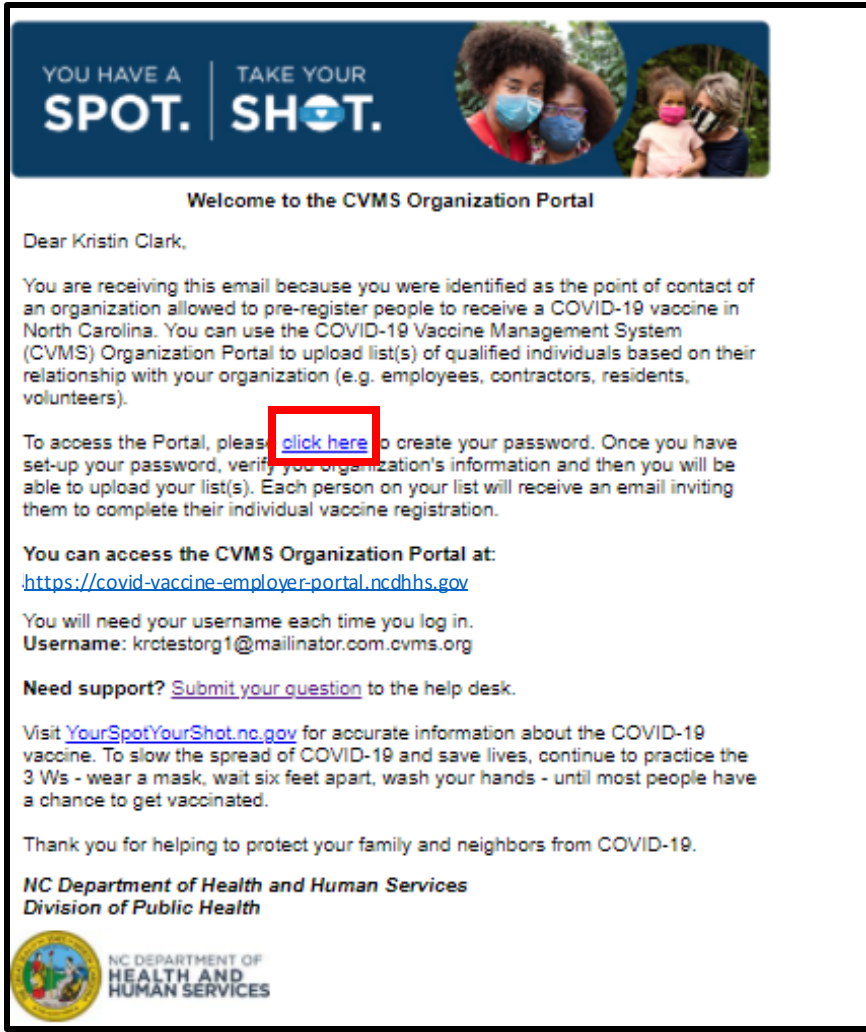
Organization Point of Contact



***A COVID-19 Vaccine Portal Account is NOT REQUIRED to schedule an appointment to receive the COVID-19 vaccine. Recipients may contact a participating COVID-19 vaccinating provider to verify their Vaccine Group and schedule an appointment to receive the COVID-19 vaccine.***

# Log-In the CVMS Organization Portal

# Step 1 of 4: Receive Email & Follow Email Instructions



First, the NCDHHS team or a Healthcare Location Manager at any enrolled COVID-19 vaccinating provider (e.g., Local Health Department) can invite a frontline organization to register in the CVMS Organization Portal.

If invited, the point of contact for the frontline organization selected by the provider will be sent an email from [nccvms@dhhs.nc.gov](mailto:nccvms@dhhs.nc.gov) inviting them to complete the registration process in the CVMS Organization Portal.

The username included in the email will be your **CVMS ORGANIZATION PORTAL USERNAME**.

1. Click the **HYPERLINK** to reset your password

## Audience

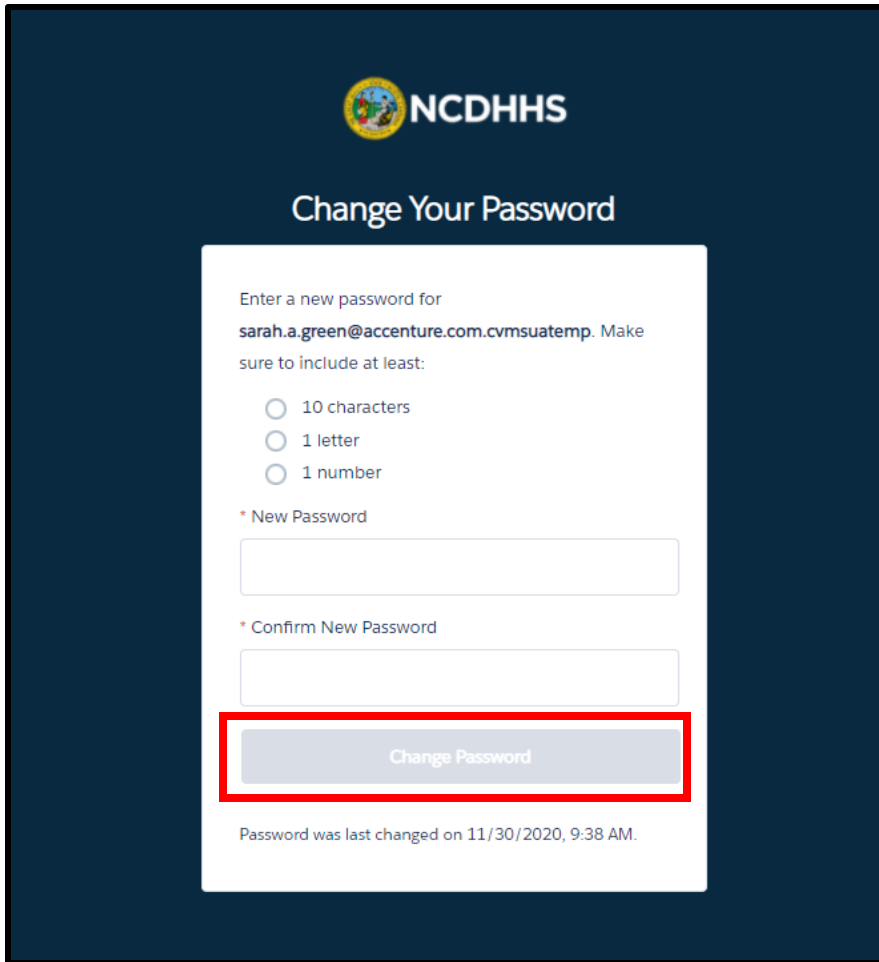
Organization Point of Contact

## Tips

Your username for the CVMS Organization Portal will be the email address used by the provider to invite you to register with .cvms.org added. For example, if your email is [first.last@email.com](mailto:first.last@email.com), then your CVMS Organization Portal username would be [first.last@email.com.cvms.org](mailto:first.last@email.com.cvms.org)



## Step 2 of 4: Change Password



The screenshot shows a web form titled "Change Your Password" from the NCDHHS. The form is set against a dark blue background. At the top, the NCDHHS logo is visible. The form itself is a white box containing the following elements:

- Text: "Enter a new password for sarah.a.green@accenture.com.cvmsuatemp. Make sure to include at least:"
- Three radio button options:
  - ☐ 10 characters
  - ☐ 1 letter
  - ☐ 1 number
- A label "\* New Password" above a text input field.
- A label "\* Confirm New Password" above another text input field.
- A "Change Password" button, which is highlighted with a red rectangular border.
- At the bottom, a status message: "Password was last changed on 11/30/2020, 9:38 AM."

After clicking the link in the email, you will be prompted to **CHANGE YOUR PASSWORD**.

1. Enter a **NEW PASSWORD**
2. Re-enter the **NEW PASSWORD TO CONFIRM**
3. Click **CHANGE PASSWORD**

*After creating the password, you will be automatically logged in to the CVMS Organization Portal.*

### Audience

Organization Point  
of Contact

## Step 3 of 4: View the CVMS Organization Portal Homepage

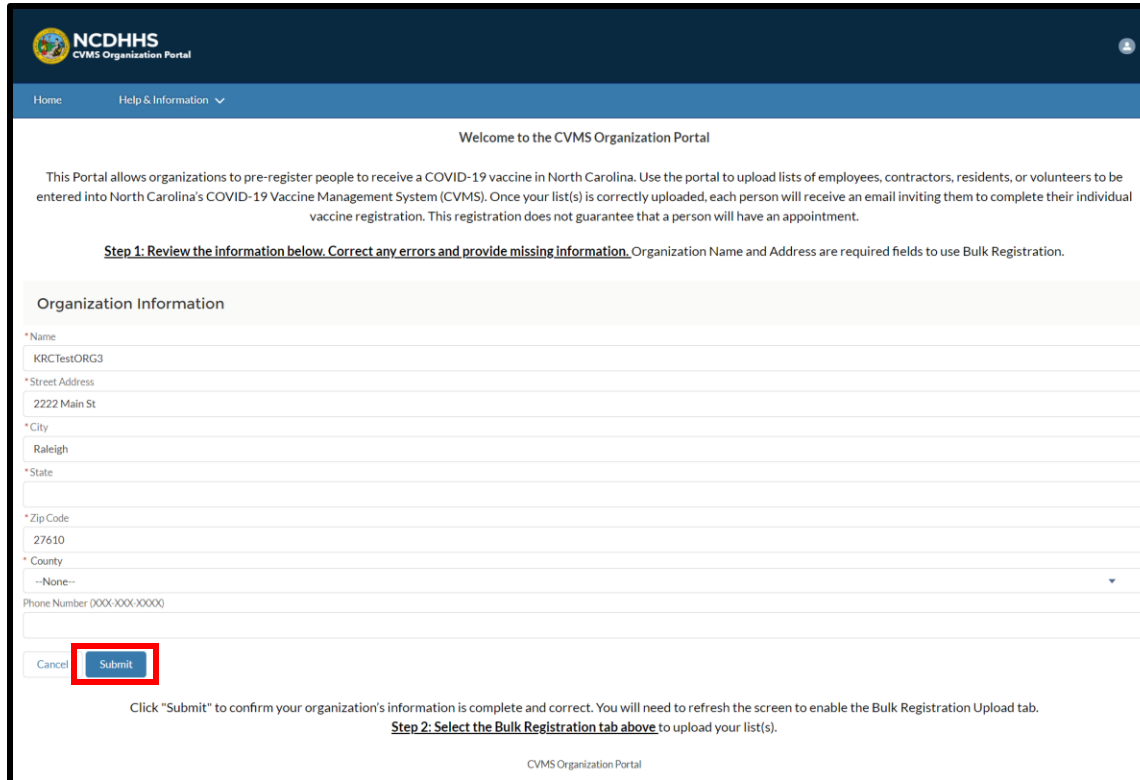
The CVMS Organization Portal Homepage will be the main page for you to complete your required activities.

Before being able to begin the bulk upload process, the Org Point of Contact needs to verify their organization's information. Only after the SUBMIT button is clicked can the **BULK REGISTRATION TAB** be accessed

1. Review and **UPDATE** the different fields
2. Click **SUBMIT**

### Audience

Organization Point  
of Contact



The screenshot displays the CVMS Organization Portal homepage. At the top, there is a dark blue header with the NCDHHS logo and the text "CVMS Organization Portal". Below the header is a navigation bar with "Home" and "Help & Information" (with a dropdown arrow). The main content area has a white background and a blue border. It starts with a "Welcome to the CVMS Organization Portal" message. Below this is a paragraph explaining the portal's purpose: "This Portal allows organizations to pre-register people to receive a COVID-19 vaccine in North Carolina. Use the portal to upload lists of employees, contractors, residents, or volunteers to be entered into North Carolina's COVID-19 Vaccine Management System (CVMS). Once your list(s) is correctly uploaded, each person will receive an email inviting them to complete their individual vaccine registration. This registration does not guarantee that a person will have an appointment." This is followed by a step instruction: "Step 1: Review the information below. Correct any errors and provide missing information. Organization Name and Address are required fields to use Bulk Registration." Below this is a form titled "Organization Information". The form contains several fields: "Name" (with "KRCtestORG3" entered), "Street Address" (with "2222 Main St" entered), "City" (with "Raleigh" entered), "State" (empty), "Zip Code" (with "27610" entered), "County" (a dropdown menu showing "--None--"), and "Phone Number (XXX.XXX.XXXX)" (empty). At the bottom of the form are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red rectangle. Below the form, there is a note: "Click 'Submit' to confirm your organization's information is complete and correct. You will need to refresh the screen to enable the Bulk Registration Upload tab." This is followed by another step instruction: "Step 2: Select the Bulk Registration tab above to upload your list(s)." The footer of the page says "CVMS Organization Portal".


# Step 4 of 4: View the CVMS Organization Portal Homepage

After submitting your registration details, a new **BULK REGISTRATION** tab will appear in the header.

You may now begin the **RECIPIENT BULK UPLOAD PROCESS** to invite your recipients to register for the COVID-19 vaccine in the COVID-19 Vaccine Portal. Having the recipients pre-registered in the COVID-19 Vaccine Portal will significantly shorten the process that the providers need to follow for check-in on the day of the recipients' vaccination.

## Audience

Organization Point of Contact

 **NCDHHS**  
CVMS Organization Portal

Home

**Bulk Registration**

Help & Information

Welcome to the CVMS Organization Portal

This Portal allows organizations to pre-register people to receive a COVID-19 vaccine in North Carolina. Use the portal to upload lists of employees, contractors, residents, or volunteers to be entered into North Carolina's COVID-19 Vaccine Management System (CVMS). Once your list(s) is correctly uploaded, each person will receive an email inviting them to complete their individual vaccine registration. This registration does not guarantee that a person will have an appointment.

**Step 1:** Review the information below. Correct any errors and provide missing information. Organization Name and Address are required fields to use Bulk Registration.

Organization Information

\* Name

KRCTestORG3

\* Street Address

2222 Main St

\* City

Raleigh

\* State

NC

\* Zip Code

27610

\* County

Phone Number (XXX)XXX-XXXX

Cancel

Submit

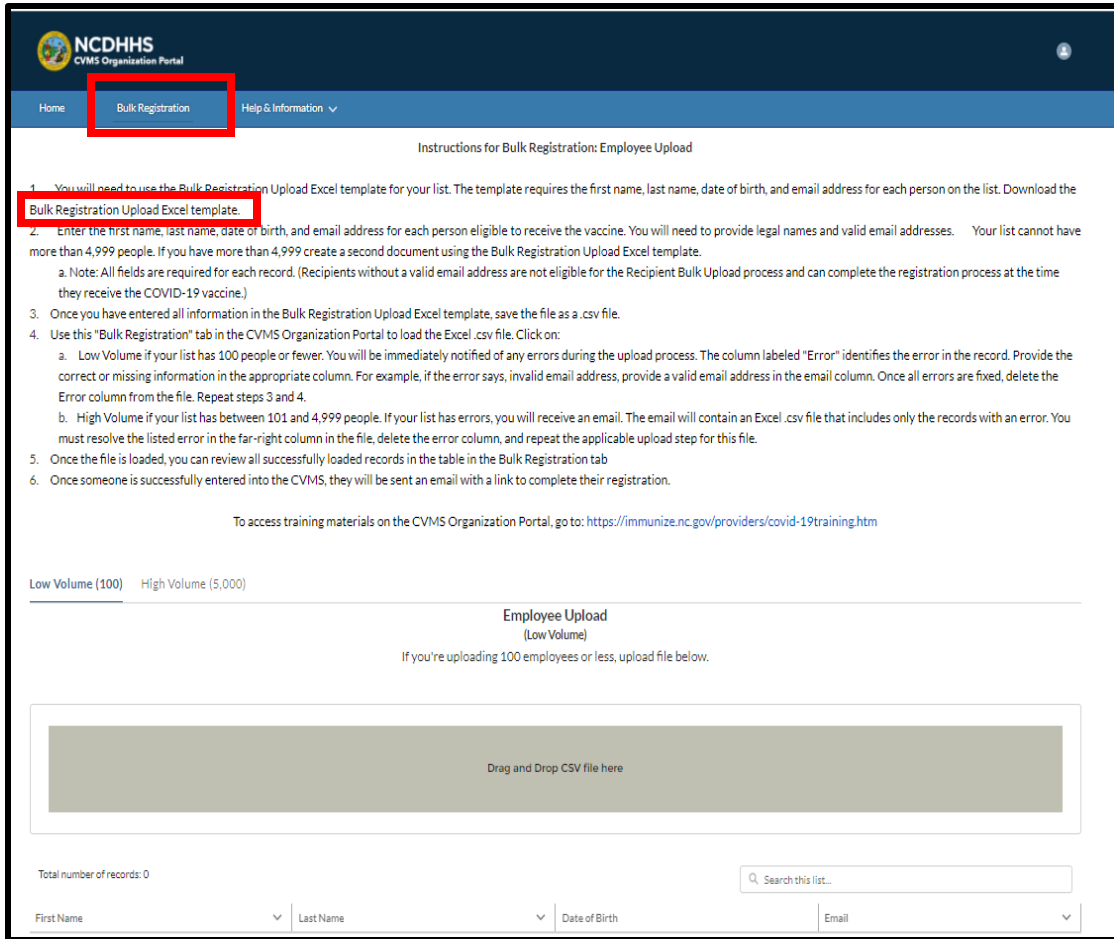
Click "Submit" to confirm your organization's information is complete and correct. You will need to refresh the screen to enable the Bulk Registration Upload tab.

**Step 2:** Select the Bulk Registration tab above to upload your list(s).

CVMS Organization Portal

# Prepare the Recipient Bulk Upload File

# Step 1 of 4: Download the Recipient Bulk Upload Template

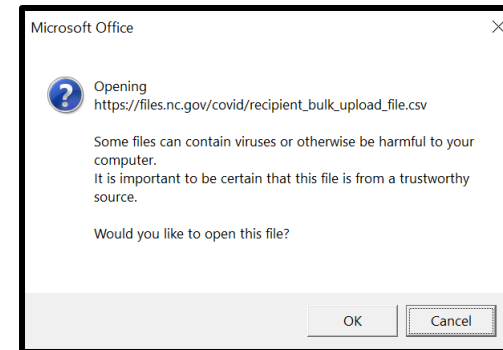


The screenshot shows the NCDHHS CVMS Organization Portal. The 'Bulk Registration' tab is highlighted with a red box. Below the navigation bar, the page title is 'Instructions for Bulk Registration: Employee Upload'. A list of instructions is provided, with the first instruction, 'You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, date of birth, and email address for each person on the list. Download the Bulk Registration Upload Excel template.', also highlighted with a red box. Below the instructions, there is a link to training materials: <https://immunize.nc.gov/providers/covid-19training.htm>. The page also features a section for 'Employee Upload (Low Volume)' with a 'Drag and Drop CSV file here' area and a search bar.

After clicking the Bulk Registration tab, you will click the link in STEP1 to download the bulk registration upload Excel template.

1. Click on the **Bulk Registration** tab
2. Click **Download the Bulk Registration Upload Excel template**

Note: If the following error message appears, please click on **OK**:



3. When the file is downloaded, **OPEN IT** in Excel

## Audience

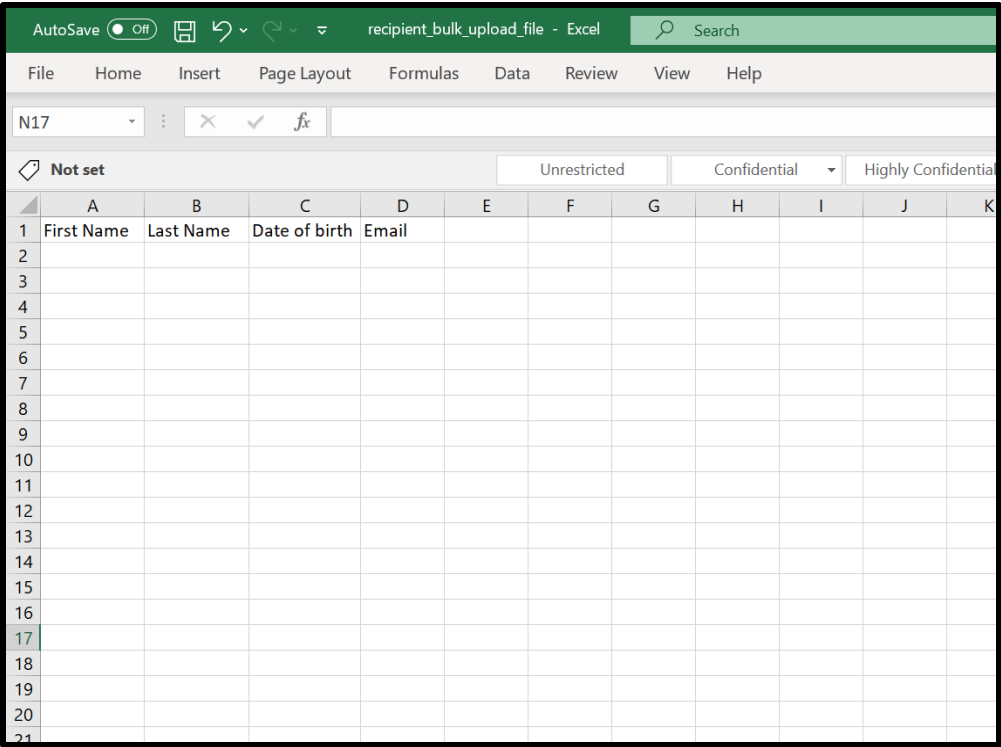
Organization Point of Contact

## Tips

The Recipient Bulk Upload Template is also available at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#)

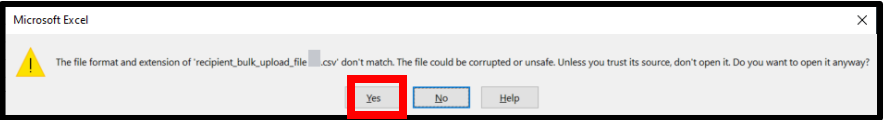
In general, downloaded files are automatically saved in the Downloads folder. This folder is usually located on the drive where Windows is installed (for example, C:\users\your name\downloads).

# Step 2 of 4: Open the Recipient Bulk Upload file in Excel

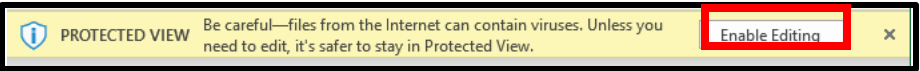


Open the **RECIPIENT BULK UPLOAD** file in Excel

If an alert message on the file format appears, click “Yes” to confirm you wish to open the file



In Excel at the top of the file, click on **ENABLE EDITING** to be allowed to enter data



## Audience

Organization Point of Contact

## Step 3 of 4: Add Recipients Data to Bulk Upload Template

To begin the Recipient Bulk Upload process, you will need to collect information on your eligible recipients. Ensure that legal names and real email addresses are captured. Please do not enter more than 5,000 recipients in the file. If you need to enter more than 5,000 recipients, please create a second file. You can upload as many files as needed.

	A	B	C	D	E	F
1	First name	Last name	Date of birth	Email		
2	Ashley1	Learn	12/1/1955	Ash1.Example@mailinator.com		
3	Ashley2	Learn	12/2/1955	Ash2.Example@mailinator.com		
4	Ashley3	Learn	12/3/1955	Ash3.Example@mailinator.com		
5	Ashley4	Learn	12/4/1955	Ash4.Example@mailinator.com		
6	Ashley5	Learn	12/5/1955	Ash5.Example@mailinator.com		
7	Ashley6	Learn	12/6/1955	Ash6.Example@mailinator.com		
8	Ashley7	Learn	12/7/1955	Ash7.Example@mailinator.com		
9	Ashley8	Learn	12/8/1955	Ash8.Example@mailinator.com		
10	Ashley9	Learn	12/9/1955	Ash9.Example@mailinator.com		
11	Ashley10	Learn	12/10/1955	Ash10.Example@mailinator.com		
12						
13						

1. Enter the following information in the file:

- First Name
- Last Name
- Date of Birth
- Email Address

### Audience

Organization Point  
of Contact

### Tips

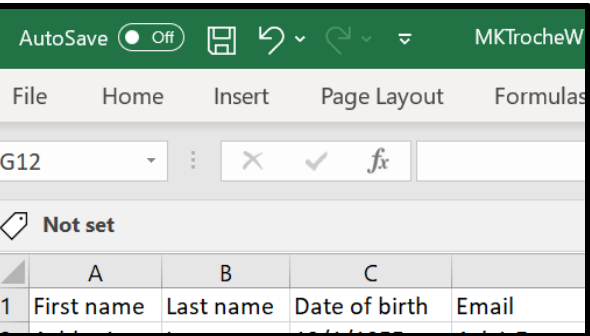
Each recipient does not need to have a unique email address. CVMS can accept duplicate email addresses so long as the Name and Date of Birth do not also match.

# Step 4 of 4: Verify & Save the File as a csv file

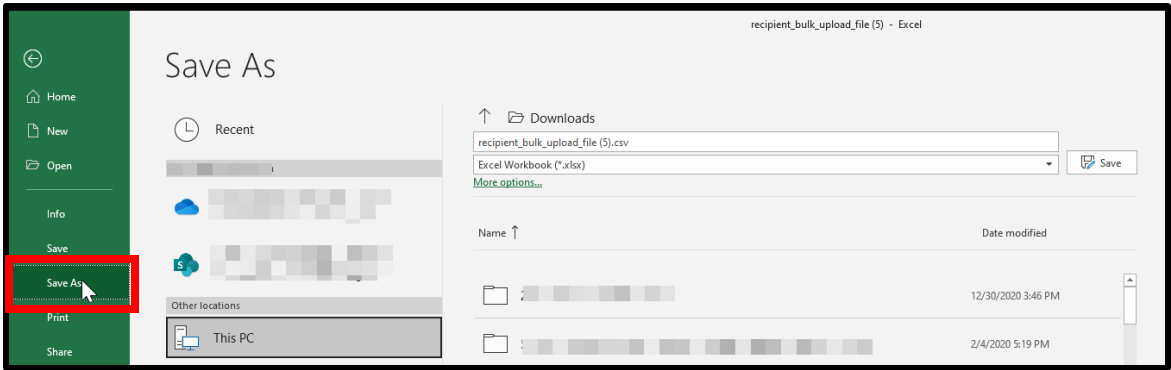
After verifying that all data has been accurately entered into the Excel file, **SAVE THE FILE AS A .CSV FILE.**

*By default, Excel will change the file format to an .xls Excel file. Please change file format back to a .CSV file.*

1. Click the **FILE** button



2. Click **SAVE AS**



3. Enter a **FILE NAME** (no name requirement)

4. Select the file type **CSV (comma-delimited) (\*.csv)**



## Audience

Organization Point  
of Contact

## Tips

Depending on the spreadsheet application and version installed on your computer, differences in that process may apply.

Regardless of those differences, **save the file as a .csv file.**



# Option 1 - Upload 100 or Fewer Recipient Records at a Time (Low Volume)

# Step 1 of 4: Select the Low Volume tab for 100 or fewer records

We recommend using this method if possible since it will be faster. If you have several hundred recipients, you can create multiple files of 100 or fewer recipients to upload individually. Each file will need to contain 100 or fewer recipients to upload.

- 1. At the top of your Homepage, navigate to the **BULK REGISTRATION** screen
- 2. Select the **LOW VOLUME** tab

HomeBulk RegistrationHelp & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)

2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.

Note: All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)

3. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.

4. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:

Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.

High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.

5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab

6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

Low Volume (100)High Volume (5,000)

Employee Upload  
(Low Volume)

If you're uploading 100 employees or less, upload file below.

Drag and Drop CSV file here


## Audience

Organization Point of Contact

## Tips

The Recipient Bulk Upload File should be saved as a .CSV file.


You may repeat this process multiple times in groups of 100 or less recipients.



NC DEPARTMENT OF  
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## Step 2 of 4: Uploading the Recipient Bulk Upload File with the Low Volume Tab


NCDHHS  
CVMS Organization Portal

[Home](#)
[Bulk Registration](#)
[Help & Information](#)

### Instructions for Bulk Registration: Employee Upload

- You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)
- Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.
  - Note:** All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)
- Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.
- Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:
  - Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.
  - High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.
- Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab
- Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

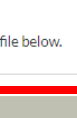
To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

[Low Volume \(100\)](#)   [High Volume \(5,000\)](#)

#### Employee Upload

(Low Volume)

If you're uploading 100 employees or less, upload file below.



Drag and Drop CSV file here

[+ Copy](#)

Total number of records: 0

Search this list...

First Name	Last Name	Date of Birth	Email
No results			

When you upload your Recipient Bulk Upload File using the Low Volume tab, you will be able to review your data before creating the records.

1. Drag and drop your file to the **DRAG AND DROP CSV FILE HERE** area
2. After you dropped the file, you will see the content of the file appear in the table below the **DRAG AND DROP CSV File** area

## Audience

## Organization Point of Contact

## Tips

Remember, you can only upload a maximum of 100 recipient records at a time using the Low Volume tab.

For instructions on using the High Volume tab, skip to the next section of this User Guide.

# Step 3 of 4: Review Your Data in the Low Volume Tab

- 1. **REVIEW** the uploaded data
- 2. If you find errors or missing information, click **CANCEL**
  - *Clicking **CANCEL** removes the file*
- 3. If the data looks correct, click the **CREATE RECORDS** button

## Audience

Organization Point  
of Contact

Low Volume (100)

High Volume (5,000)

Employee Upload

(Low Volume)

If you're uploading 100 employees or less, upload file below.

MKTrocheWITHERERRORS.csv (application/vnd.ms-excel)- 578bytes, last modified: 3/10/2021

FIRST NAME	LAST NAME	DATE OF BIRTH	EMAIL
Ashley1	Learn	12/1/1955	Ash1.Example@mailinator.com
Ashley2	Learn	12/2/1955	Ash2.Example@mailinator.com
Ashley3	Learn	12/3/1955	Ash3.Example@mailinator.com
Ashley4	Learn	12/4/1955	Ash4.Example@mailinator.com
Ashley5	Learn	12/5/1955	Ash5.Example@mailinator.com
Ashley6	Learn	12/6/1955	Ash6.Example@mailinator.com
Ashley7	Learn	12/7/1955	Ash7.Example@mailinator.com
Ashley8	Learn	12/8/1955	Ash8.Example@mailinator.com
Ashley9	Learn	12/9/1955	Ash9.Example@mailinator.com
Ashley10	Learn	12/10/1955	Ash10.Example@mailinator.com

Create Records

Cancel

Total number of records: 0

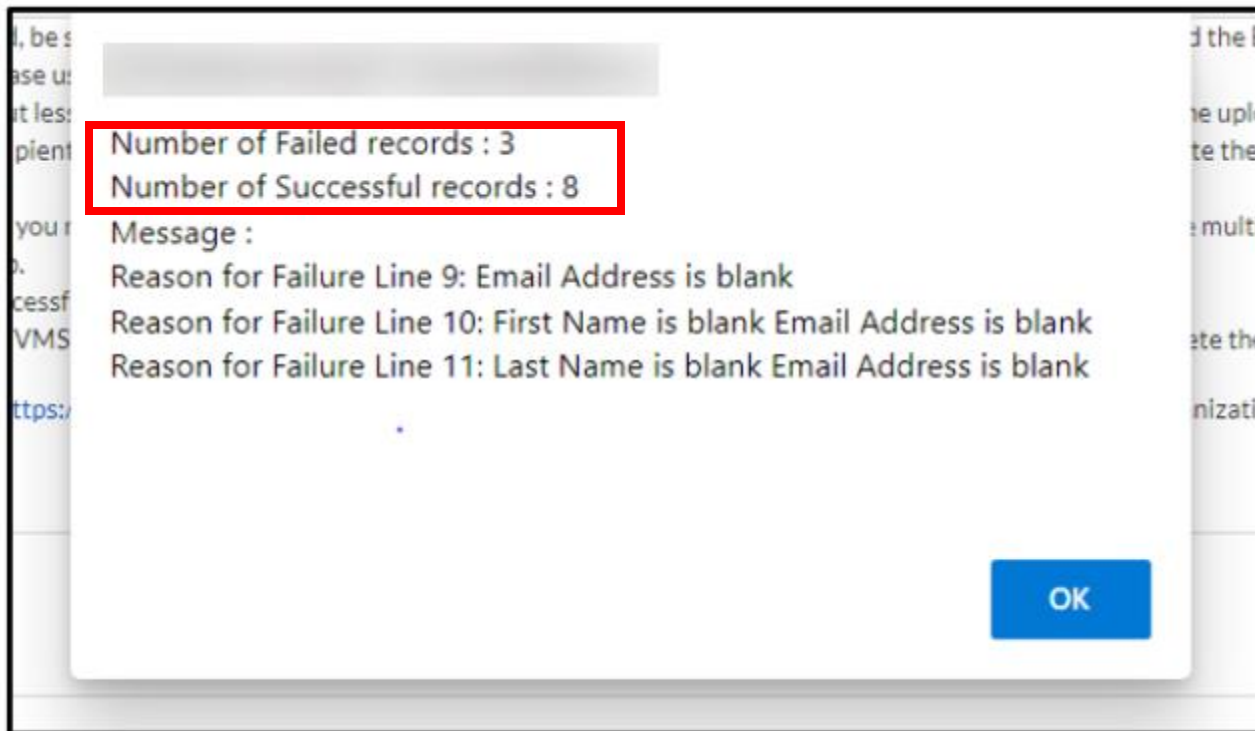
Search this file

## Step 4 of 4: Review Successful and Failed Record Alert Message

After creating the records using the **LOW VOLUME TAB**, you will see an **ALERT MESSAGE** appear. The message will state the number of **SUCCESSFUL** recipient records uploaded and the number of recipient records that **FAILED** to be uploaded.

Once you click **OK**, the recipients who were successfully loaded will be sent **AN AUTOMATIC EMAIL NOTIFICATION** allowing them to **REGISTER** to the **COVID-19 VACCINE PORTAL**.

*We will cover how to manage **FAILED RECIPIENT UPLOADS** in the **VIEW AND RE-UPLOAD FILE SECTION**.*



### Audience

Organization Point  
of Contact

### Tips

You can view all uploaded recipients in the CVMS Organization Portal, whether they were uploaded through the Low Volume or High Volume tab.

# Option 2 - Upload More than 100 Recipient Records at a Time (High Volume)

# Step 1 of 4: Select the High Volume tab for more than 100 records

If you have a significant number of recipients to upload at once (over 100 recipients, but less than 5,000 recipients), you will need to use the High Volume process.

- 1. Click the **HIGH VOLUME TAB**
- 2. Click **UPLOAD FILE** and select the prepared Bulk Recipient Upload file **FROM YOUR DESKTOP** or **DRAW AND DROP THE FILE** unto the page

HomeBulk RegistrationHelp & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)

2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.

Note: All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)

3. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.

4. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:

a. Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.

b. High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.

5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab

6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

Low Volume (100)High Volume (5,000)


Employee Upload

(High Volume)

If you're uploading between 101 and 5,000 employees, upload or drop file below. (This process may take up to 30 minutes to complete.)

Upload or drop CSV file here

Upload FilesOr drop files



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HUMAN SERVICES

## Audience

Organization Point  
of Contact

## Tips

Use Low Volume Tab if  
High Volume tab is giving  
error

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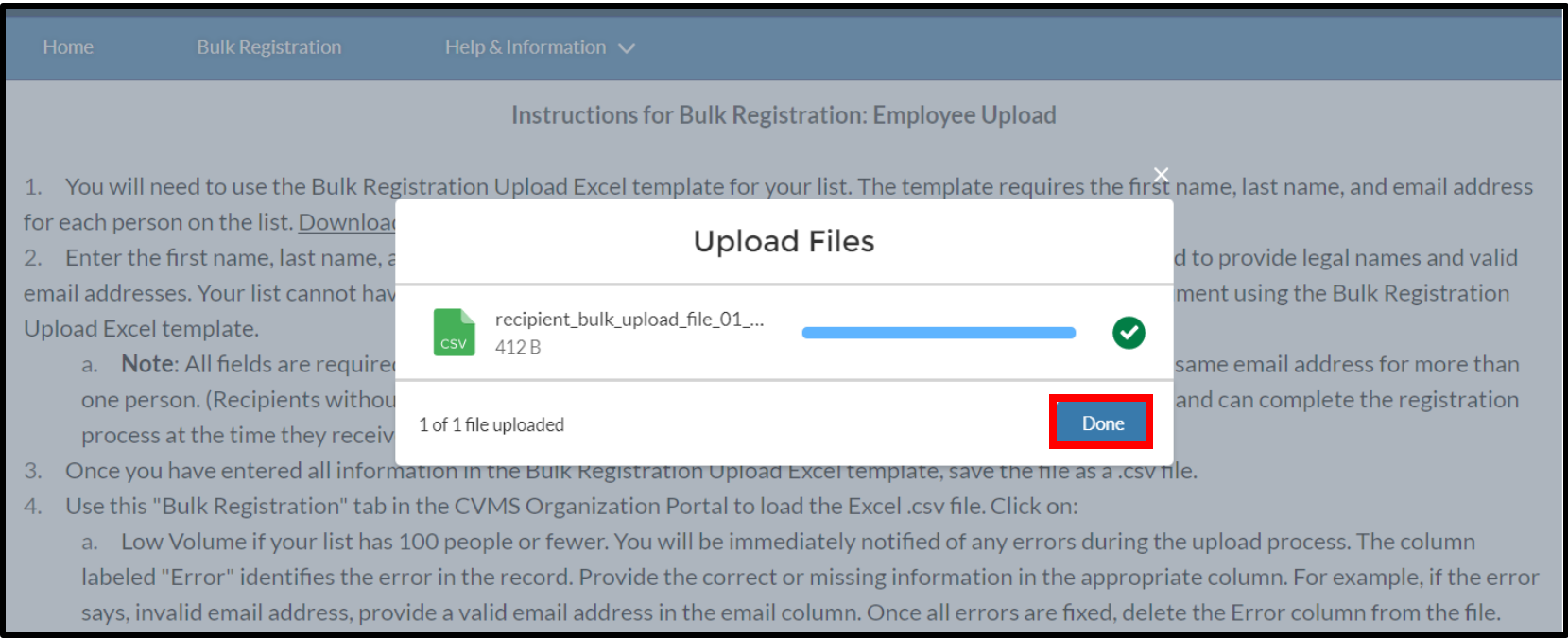
# Step 2 of 4: While Your High Volume Recipient Bulk Upload is Processing

Unlike the low volume process, the contents of your file will not appear on the screen prior to completion of your file's upload.

It is also worth noting that larger files will take longer to upload. While CVMS processes your upload, you will be able to leave the page and it will continue processing in the background.

If upload process for High Volume is giving error, use the Low Volume tab instead

- 1. Click **DONE** once the upload is complete



## Audience

Organization Point of Contact

## Tips

This process may take up to 30 minutes to complete for larger files.



# Step 3 of 4: Successful High Volume Recipient Bulk Upload

Once your file is successfully uploaded, you will see a **SUCCESS BANNER** appear at the top of the page. You will also receive an automatic email notification.

If all your recipient records were successfully created, you will receive an email notification with the number of successfully created records.


Successfully loaded recipients will be sent **AN AUTOMATIC EMAIL NOTIFICATION** inviting them to **REGISTER** to the **COVID-19 Vaccine Portal**.

## Audience

Organization Point of Contact

## Tips

See the next section for how to manage failed recipient uploads.



Success  
File submitted for processing

Home

Bulk Registration

Help & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)

2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.

3. **Note:** All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)

4. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.

5. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:

6. a. Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.

7. b. High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the file.

8. 6. Once the file is loaded, you can review all successful records.

9. 6. Once someone is successfully entered into the CVMS system, you will receive an email.

To access training

Low Volume (100)

High Volume (5,000)

If you're uploading bulk

[External] Sandbox: Bulk Employee Upload - Success

NC CVMS <nccvms@dhhs.nc.gov>

To

Reply

Reply All


Forward

Wed 1/13/2021 12:33 PM

The Bulk Employee upload file has been successfully loaded with no rejected records. Details of the file loaded are below:

Filename:MKTrocheWITHEERRORS

Number of Records Successfully Loaded: 1000

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HEALTH AND  
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# Step 4 of 4: Failed High Volume Recipient Bulk Upload

If there were any errors in your file upload, you will receive an email notification with a summary of **SUCCESSFUL AND FAILED RECORDS**. In the next section, we will cover how to manage failed recipient uploads.

Only successfully loaded recipients will be sent **AN AUTOMATIC EMAIL NOTIFICATON** allowing them to **REGISTER** to the **COVID-19 Vaccine Portal**.

Bulk Employee Upload - Failure

NC

NC CVMS <nccvms@dhhs.nc.gov>

To

X

a

BulkError.csv

486 bytes

The Bulk Employee upload file has loaded with errors. Please review below for details of the file. Please review the attachment for the specific lines that failed:

Filename:MKTrocheWITHERERRORS

Number of Records In File:1

Number of Records Successfully Loaded: 999

Number of Records Failed:1

## Audience

Organization Point of Contact

## Tips

See the next section for how to manage failed recipient uploads.

# Correct File Errors

# Step 1 of 3: Receive Email with Upload File Errors

If any recipient records included in your recipient bulk upload failed to upload, you will **AUTOMATICALLY BE SENT AN EMAIL** from the CVMS Organization Portal.

The attachment included in the email will **CONTAIN THE FAILED RECORDS** in the same recipient bulk upload format. It will also include an additional column with the **REASON FOR FAILURE**.

- 1. OPEN THE EMAIL
- 2. OPEN THE EXCEL ATTACHMENT in the email

Not set		Unrestricted		Confidential	Highly Confidential	Restricted
	A	B	C	D	E	
1	FirstName	LastName	Date of birth	Email	Error	
2	Nicholas		12/2/1955	Nicholas.NoEmail@companyemail2.com	Line 2: Required fields are missing: [LastName]	
3	Nicholas	TestLoadE2Recip3	12/3/1955	Nicholas.NoEmail@companyemail3.com	Line 3: Email: invalid email address: Duplicated Nicholas.NoEmail@companyemail3.com	
4	Nicholas			Nicholas.NoEmail@companyemail4.com	Line 4: Required fields are missing: [Date of birth]	
5	Nicholas	TestLoadE2Recip5	12/5/1955	bademail	Line 5: Email: invalid email address: bademail	
6	Nicholas	TestLoadE2Recip6	12/6/1955		Line 6: Required fields are missing: [Email]	
7	Nicholas	TestLoadE2Recip7	12/7/1955	Nicholas.NoEmail@	Line 8: Email: invalid email address: Nicholas.NoEmail@	
8	Nicholas	TestLoadE2Recip8	12/8/19555	Nicholas.NoEmail@companyemail8.com	Line 8: Date of birth: invalid Date of birth: 12/8/19555	
9						

## Audience

Organization Point of Contact

## Tips

You will be sent an email with any failed records, whether you use the Low Volume tab or the High Volume tab.

## Step 2 of 3: Fix File Errors

Inside the attachment will be a list of recipients records that failed to load into the system.

*Successfully loaded recipients will not be included in this list.*

- 1. In the Excel file attached to the email, find the column **ERROR**
- 2. Use the **ERROR** field to identify the issue and **CORRECT THE DATA IN THE SAME EXCEL FILE**

Audience

Organization Point  
of Contact

Not set					Unrestricted	Confidential	Highly Confidential	Restricted
	A	B	C	D	E			
1	FirstName	LastName	Date of birth	Email	Error			
2	Nicholas		12/2/1955	Nicholas.NoEmail@companyemail2.com	Line 2: Required fields are missing: [LastName]			
3	Nicholas	TestLoadE2Recip3	12/3/1955	Nicholas.NoEmail@companyemail3.com	Line 3: Email: invalid email address: Duplicated Nicholas.NoEmail@companyemail3.com			
4	Nicholas			Nicholas.NoEmail@companyemail4.com	Line 4: Required fields are missing: [Date of birth]			
5	Nicholas	TestLoadE2Recip5	12/5/1955	bademail	Line 5: Email: invalid email address: bademail			
6	Nicholas	TestLoadE2Recip6	12/6/1955		Line 6: Required fields are missing: [Email]			
7	Nicholas	TestLoadE2Recip7	12/7/1955	Nicholas.NoEmail@	Line 8: Email: invalid email address: Nicholas.NoEmail@			
8	Nicholas	TestLoadE2Recip8	12/8/19555	Nicholas.NoEmail@companyemail8.com	Line 8: Date of birth: invalid Date of birth: 12/8/19555			
9								

## Step 3 of 3: Save and Re-Upload the Updated Recipient Bulk Upload File

Once you review and correct any recipient data errors, you are ready to **RE-UPLOAD THE UPDATED FILE**. If you have less than 100 errors to correct, you can re-upload your file using the Low Volume tab option.

1. On the same sheet where you made your updates, **DELETE** the **ERROR COLUMN**
2. **SAVE** the file as a **.CSV**
3. Navigate to the **BULK REGISTRATION** tab
4. Upload your file using the **LOW VOLUME OR HIGH VOLUME TAB**

Home Bulk Registration Help & Information

Instructions for Bulk Registration: Employee Upload

1. You will need to use the Bulk Registration Upload Excel template for your list. The template requires the first name, last name, and email address for each person on the list. [Download the Bulk Registration Upload Excel template.](#)
2. Enter the first name, last name, and email address for each person eligible to receive the vaccine. You will need to provide legal names and valid email addresses. Your list cannot have more than 4,999 people. If you have more than 4,999 create a second document using the Bulk Registration Upload Excel template.
  - a. **Note:** All fields are required for each record, including a valid, unique email address. You cannot use the same email address for more than one person. (Recipients without a valid email address are not eligible for the Recipient Bulk Upload process and can complete the registration process at the time they receive the COVID-19 vaccine.)
3. Once you have entered all information in the Bulk Registration Upload Excel template, save the file as a .csv file.
4. Use this "Bulk Registration" tab in the CVMS Organization Portal to load the Excel .csv file. Click on:
  - a. Low Volume if your list has 100 people or fewer. You will be immediately notified of any errors during the upload process. The column labeled "Error" identifies the error in the record. Provide the correct or missing information in the appropriate column. For example, if the error says, invalid email address, provide a valid email address in the email column. Once all errors are fixed, delete the Error column from the file. Repeat steps 3 and 4.
  - b. High Volume if your list has between 101 and 4,999 people. If your list has errors, you will receive an email. The email will contain an Excel .csv file that includes only the records with an error. You must resolve the listed error in the far-right column in the file, delete the error column, and repeat the applicable upload step for this file.
5. Once the file is loaded, you can review all successfully loaded records in the table in the Bulk Registration tab
6. Once someone is successfully entered into the CVMS, they will be sent an email with a link to complete their registration.

To access training materials on the CVMS Organization Portal, go to: <https://immunize.nc.gov/providers/covid-19training.htm>

Low Volume (100) High Volume (5,000)

**Employee Upload**  
(Low Volume)

If you're uploading 100 employees or less, upload file below.

Drag and Drop CSV file here

### Audience

Organization Point  
of Contact

### Tips

Remember, the only columns that should be listed in your file are First Name, Last Name, Date of Birth, and Email address.

# Fix File Errors – Potential Reasons for Failure

There are a few reasons why a recipient record may fail to be uploaded – from blank fields to invalid data formats.

## Potential Error Messages:

### 1. EMAIL ADDRESS IS DUPLICATE:

- Meaning: The email address you attempted to upload was already found in the system under the same first name, last name, and Date of birth. CVMS does not require a unique email for each recipient, but the system will check the first name, last name, and DOB to see if it's a duplicate.

### 2. FIRST & LAST NAME CANNOT BE EMPTY:

- Meaning: A name value was not entered

### 3. EMAIL CANNOT BE BLANK:

- Meaning: A email value was not entered

### 4. INVALID EMAIL ADDRESS:

- Meaning: An invalid email address was submitted. CVMS looks for @ sign in email field.

### 5. DATE OF BIRTH CANNOT BE BLANK

- Meaning: A Date of birth value was not entered

### 6. INVALID DATE OF BIRTH

- Meaning: An invalid Date of birth was submitted. CVMS only accepts mm/dd/yyyy date of birth format

## Audience

Organization Point  
of Contact

# Submit the Recipient Bulk Upload File via the CVMS Help Desk Portal



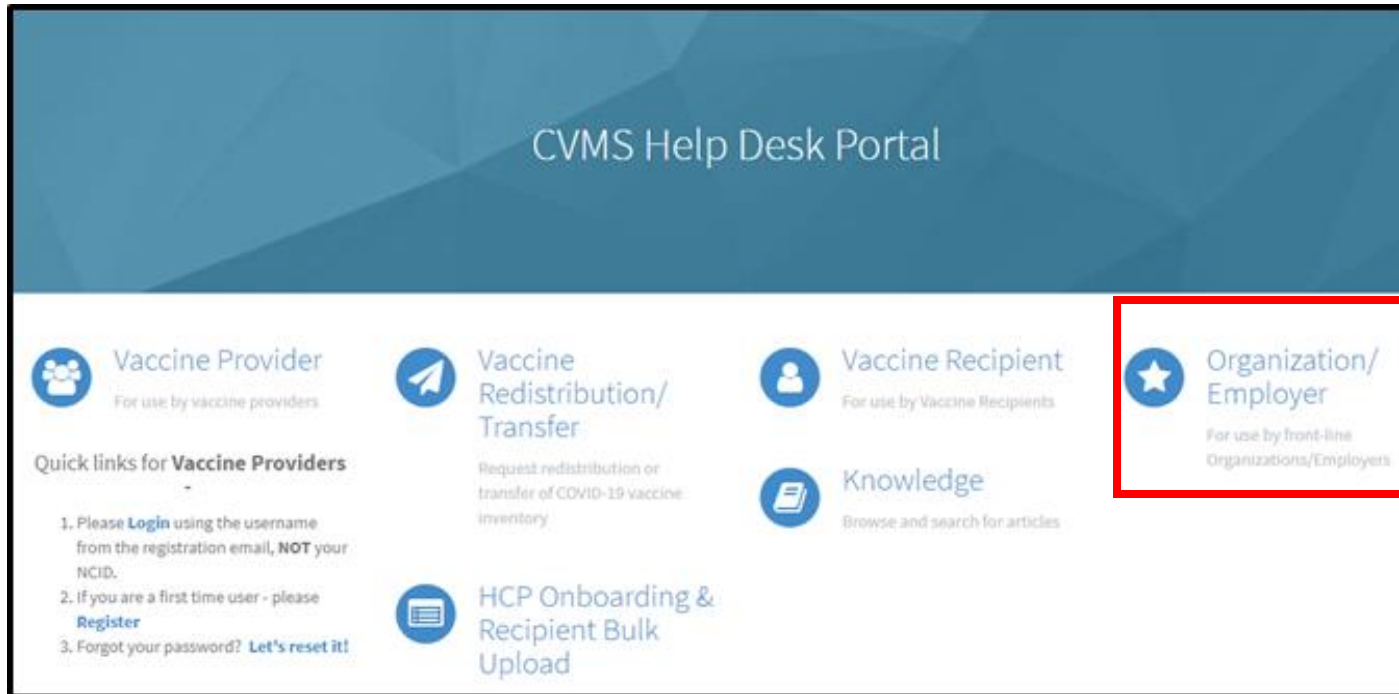
## Step 1 of 2: Initiate a Recipient Bulk Upload Template Processing Request

For locations needing assistance with uploading recipients to the CVMS Organization Portal, you can submit a ticket with your completed Recipient Bulk Upload Template to the CVMS Help Desk Portal.

1. Navigate to the CVMS Help Desk Portal at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)
2. From the Home page, click the **Organization / Employer** button to submit your request with your completed Recipient Bulk Upload Template attached to the ticket

### Audience

Organization Point  
of Contact



# Step 2 of 2: Receive an email of confirmation

- 1. After submitting the file, you will receive a confirmation email with the case number
- 2. If you click on the link, you will be re-directed to a summary view of the case

Case VACHCP0001015 opened - Recipient Bulk Upload

IT Service Desk  
to me ▾

Your case has been created, click here to view the case: [Link](#)

Someone will assist you soon.

HCP User Onboarding

Start

John Smith  
just now  
NC\_Portal\_Intake\_AssignmentGroupMappings.xlsx  
19.9 KB

John Smith  
just now  
VACHCP0001014 Created

Actions

Close Case

Ticket Fields details

Number	Priority
VACHCP0001014	3 - Moderate
State	Account
New	Unregistered Provider-CVMS
Updated	
just now	

Attachments

NC\_Portal\_Intake\_AssignmentGroupMappings.xlsx (19.9 KB)  
just now

Audience

Organization Point  
of Contact

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# View Uploaded Recipient Records

# View Uploaded Recipient Records

You will be able to **REVIEW YOUR LOADED RECIPIENTS** who are in the CVMS Organization Portal via the **HOME TAB**.

- 1. Navigate to the **BULK REGISTRATION TAB**
- 2. Locate the table of **LOADED RECIPIENTS**
- 3. You can **SEARCH LOADED RECIPIENTS** by **FIRST NAME AND LAST NAME** in the list view search bar
- 4. You can also **SORT** by clicking the **COLUMN NAME**
- 5. A small **ARROW** will appear next to the column name when you sort

Total number of records: 10561

First Name	Last Name	Date of Birth	Email
Mattt	Demmm	Jan 1, 1990	somnathqa05+mattt@gmail.com
Tej19820	Par19820	Mar 8, 2000	tejpary+forte19820@gmail.com
Tej19821	Par19821	Mar 8, 2000	tejpary+forte19821@gmail.com
Tej19822	Par19822	Mar 8, 2000	tejpary+forte19822@gmail.com
Tej19823	Par19823	Mar 8, 2000	tejpary+forte19823@gmail.com
Tej19824	Par19824	Mar 8, 2000	tejpary+forte19824@gmail.com
Tej19825	Par19825	Mar 8, 2000	tejpary+forte19825@gmail.com

## Audience

Organization Point of Contact

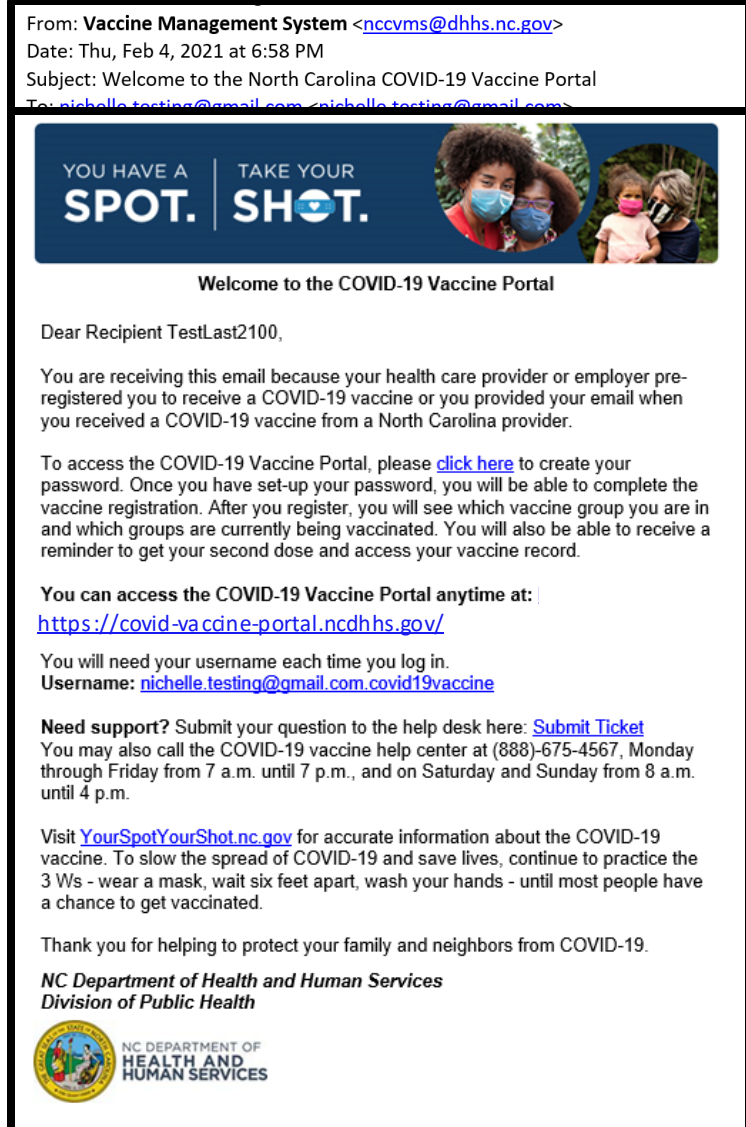
## Tips

Remember, all successfully loaded recipients will automatically receive an email allowing access to register to the COVID-19 Vaccine Portal.

You **CANNOT EDIT OR DELETE YOUR LOADED RECIPIENTS**. If you need to remove an uploaded recipient, please go to the CVMS Help Desk Portal at [https://ncgov.servicenowser vices.com/csm\\_vaccine](https://ncgov.servicenowser vices.com/csm_vaccine), select **Organization / Employer** and submit a request.

# Next Steps for the Uploaded Recipients

# COVID-19 Vaccine Portal Email Notification



Once successfully loaded into the CVMS Organization Portal, an **AUTOMATIC EMAIL NOTIFICATION** will be sent to each recipient.

The email will come from:

Vaccine Management System [nccvms@dhhs.nc.gov](mailto:nccvms@dhhs.nc.gov)

**Email Subject:** Welcome to the COVID-19 Vaccine Portal

The email will allow recipients to **REGISTER IN THE COVID-19 Vaccine Portal.**

A COVID-19 Vaccine Portal Account is **NOT REQUIRED** to **RECEIVE A COVID-19 VACCINE.**

If your recipients do not have a valid email address or do not want to register, they may contact any participating COVID-19 vaccinating provider to schedule an appointment for a COVID-19 vaccine. They can go to <https://covid19.ncdhhs.gov/findyourspot> to see a list of vaccinating providers and information on Vaccine Groups.

## Audience

Recipient

## Tips

Inform your recipients to allow incoming emails from [nccvms@dhhs.nc.gov](mailto:nccvms@dhhs.nc.gov).

Their COVID-19 Vaccine Portal username is the email address that was uploaded for them followed by .covid19vaccine.

# COVID-19 Vaccine Portal Password Reset & Username

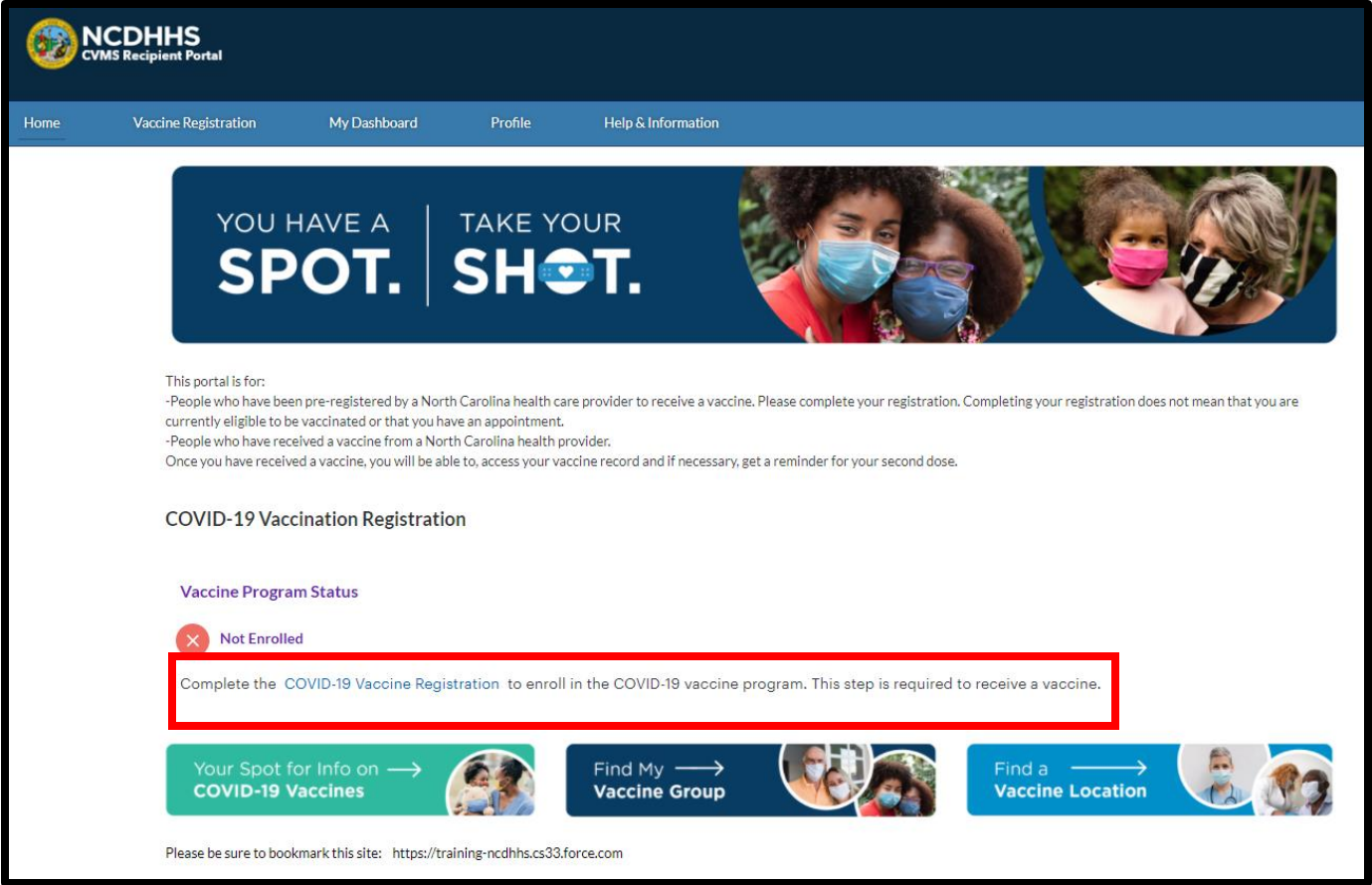
The email notification will prompt recipients to **RESET THEIR PASSWORD** and will provide their **COVID-19 VACCINE PORTAL USERNAME**.

The COVID-19 Vaccine Portal Username has **.COVID19VACCINE** added to the end of the email address that was uploaded for them. They must use the correct username to be able to sign into the COVID-19 Vaccine Portal.

After registering, recipients will be able to complete the **COVID-19 VACCINE REGISTRATION**.

## Audience

Recipient



# COVID-19 VACCINE PORTAL REGISTRATION FORM

Once they log into the **COVID-19 VACCINE PORTAL**, they will be able to complete the **COVID-19 VACCINE REGISTRATION** form. The COVID-19 Vaccine Registration form asks for **DEMOGRAPHIC DETAILS** as well as the Recipient's **VACCINE GROUP** as determined by <https://findmygroup.nc.gov>.

*A recipient's **VACCINE GROUP** is determined by the information they enter into the **FIND MY GROUP** tool at <https://findmygroup.nc.gov>. Vaccine Group requirements may be adjusted in the future by the NC Immunization Branch.*

## Audience

Recipient

Vaccine Registration for: Jon NewRecipient

Introduction > Contact and Demographic Detail > Confirmation

**Your registration is complete**

Thank you for completing the registration process. Please remember that registration does not mean that you are currently eligible to be vaccinated or that you have an appointment. A free COVID-19 vaccine will be available to all who want it, but supplies are currently limited. Get accurate information about COVID-19 vaccines at [YourSpotYourShot.NC.Gov](https://YourSpotYourShot.NC.Gov).





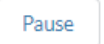


# Appendix

# Additional Notes

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## Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- **\* Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

## Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at [https://ncgov.servicenowservices.com/csm\\_vaccine](https://ncgov.servicenowservices.com/csm_vaccine)

## Supported Web Browsers:

- Please use the latest version of Chrome, Firefox or Safari, or Edge (Chromium only) browsers to access CVMS.
- For more details on supported browsers, please see [https://help.salesforce.com/articleView?id=getstart\\_browsers\\_sfx.htm&type=5](https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5)
- Note: Internet Explorer and Edge (Non-Chromium) browsers are not supported.

# User Guide Change Log

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## Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	2/11/2021	<ul style="list-style-type: none"><li>Initial Document</li></ul>	-	Nicholas Rinz, Kristin Clark
2	2/26/2021	<ul style="list-style-type: none"><li>Updates to Error Message</li></ul>	31	Nicholas Rinz, Steve DiGangi
3	3/5/2021	<ul style="list-style-type: none"><li>Updated priority tiering, DOB field, and eligibility branding to Vaccine Group</li></ul>	5, 6, 13, 14, 15,16, 20, 29, 30, 32, 36, 37	Kaitlin Gates
4	3/8/2021	<ul style="list-style-type: none"><li>Added slides to display help desk bulk upload</li></ul>	33, 34, 35	Jim Bard, Kaitlin Gates